



## Switch Kit Checklist

**CHANGE IS GOOD.**

**Print this checklist** and check off the boxes on your printed copy as you complete items.

<p>Open your membership and checking account at Wailuku Federal Credit Union. You may do this by visiting any of our branch locations or by completing an online <i>Account Card</i>.</p>
<p>Make certain funds are available in your old account to cover any automatic payments, checks, and check card transactions that may still be withdrawn.</p>
<p><i>Direct Deposit Change Request Form</i> Notify companies with which you have direct deposit (employer, government deposits, pension, transfers from other financial institutions, investment dividends, child support or court issued deposits, etc) notifying them that you want to switch your direct deposits to your new Wailuku Federal Credit Union account.</p>
<p><i>Direct Deposit / Payroll Deduction Authorization Form</i> Notify any new companies or individuals to set up direct deposit. To change Social Security deposits, visit: <a href="http://www.ssa.gov/deposit/howtosign.htm">www.ssa.gov/deposit/howtosign.htm</a> Or call the Social Security Administration: 1-800-772-1213 (TTY 1-800-325-0778) <b>Wailuku Federal Credit Union Routing/Transit number: 321380085</b></p>
<p><i>Request to Cancel Automatic Payments Form</i> Notify companies that automatically take payments from your checking account (utilities, mortgage, insurance, brokerage, credit cards, internet service providers, transfers to banks, child support, court issued payments, etc) that you are closing the account.</p>
<p><i>Request to Change Automatic Payments Form</i> Notify companies that you want to transfer existing automatic payments from your previous financial institution to Wailuku Federal Credit Union.</p>
<p>Notify companies that take payments from your old checking account using a debit card. Inform them of your new Wailuku Federal Credit Union Debit Card number and expiration date.</p>
<p>Verify your direct deposits and automatic payments have begun posting to your new account.</p>
<p>Verify that all checks, check card transactions, and scheduled bill payments have cleared your old checking account.</p>
<p><i>Account Closing Request Form</i> Notify your previous financial institution informing them you are closing your account.</p>